# END DAY COMMENTARY

17th AUG 2026

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| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|---|---|---|---|---|---|---|---|
| SENSEX | 78,009.25 | 77,892.92 | 77,928.68 | 77,453.75 | 77,728.16 | -281.09 | -0.36 |
| NIFTY | 24,366.00 | 24,343.45 | 24,360.10 | 24,226.95 | 24,287.65 | -78.35 | -0.32 |

## INDICES ENDED LOWER AMID UNCERTAINTY OVER US- IRAN WAR

The 30-share BSE Sensex was down by 281.09 points or 0.36% to settle at 77,728.16 and the Nifty was down by 78.35 points or 0.32% to settle at 24,287.65. The BSE Small Cap 250 was up by 0.06% and BSE 500 was down by 0.15%. On the sectoral front, Realty, Capital Goods, Metal and Oil & Gas were gaining indices. On the flip side, Banks, Healthcare, IT, Consumer Durables, FMCG and Auto were losing indices. Tata Steel, Axis Bank, Reliance, BEL and HDFC Bank were gainers on the Sensex; on the flip side, Infosys, HCL Tech, Sunpharma, TCS and Tech Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on a green note.

**Top Gainers**

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| HINDALCO | 1,049.9 | 1,029.5 | 1.98 |
| TATASTEEL | 186.00 | 183.50 | 1.36 |
| HDFCLIFE | 543.00 | 535.85 | 1.33 |
| ONGC | 238.49 | 236.40 | 0.88 |
| AXISBANK | 1,227.3 | 1,217.4 | 0.81 |

**Top Losers**

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| HCLTECH | 1,325.0 | 1,360.0 | -2.57 |
| INFY | 1,139.9 | 1,169.2 | -2.51 |
| SUNPHARMA | 1,882.0 | 1,930.0 | -2.49 |
| TCS | 2,313.2 | 2,361.0 | -2.02 |
| NESTLEIND | 1,470.0 | 1,499.1 | -1.94 |

## MARKET STATS (NSE)

**Most Active (by value)**

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| RELIANCE | 13383867 | 1,316.0 | 1,751.44 |
| BHARTIARTL | 5537411 | 1,969.3 | 1,099.12 |
| HDFCBANK | 14823722 | 729.00 | 1,078.59 |
| ICICIBANK | 5605603 | 1,415.3 | 793.90 |
| SBIN | 7039473 | 1,061.2 | 746.89 |

**Most Active (by volume)**

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| ONGC | 25342938 | 238.49 | 603.74 |
| ETERNAL | 18972081 | 318.00 | 605.74 |
| TATASTEEL | 16278106 | 186.00 | 300.45 |
| HDFCBANK | 14823722 | 729.00 | 1,078.5 |
| RELIANCE | 13383867 | 1,316.0 | 1,751.4 |

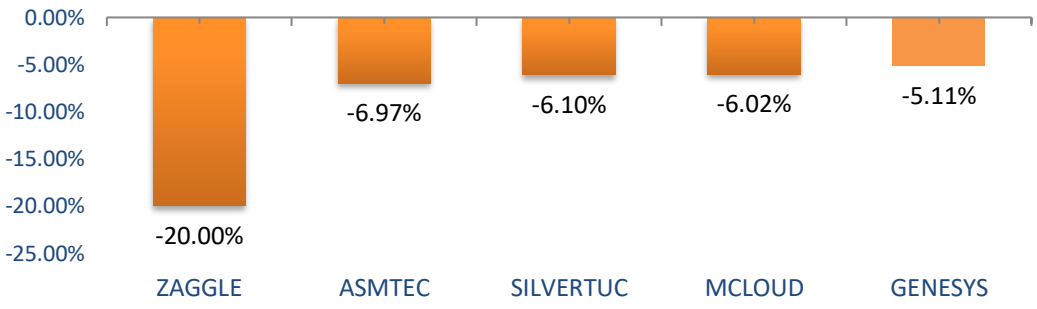
Indian equity markets ended lower on Monday, weighed down by rising crude oil prices amid continued uncertainty over U.S.-Iran peace talks and concerns surrounding the Strait of Hormuz. However, losses were limited after exchange data showed that Foreign Institutional Investors (FIIs) bought equities worth Rs 508.12 crore on Friday. Traders were cautious as preliminary data from the Reserve Bank of India (RBI) showed that India's current account deficit stood at $6.2 billion in June, compared with a surplus of $1.2 billion in the year-ago month. Traders took a note of the government's latest data report showing that India's manufacturing sector stands as a pillar of self-reliance and progress, now contributing about 16-17 percent of GDP and providing employment to over 27 million workers. Traders overlooked the commerce ministry data showing that India's exports to key free trade agreement (FTA) partner countries recorded robust growth in the first quarter of 2026-27 (Q1FY27), with shipments to Singapore and Sri Lanka more than doubling.

On the global front, European markets were trading mostly green, as investors kept a close eye on geopolitical developments in the Middle East. Asian markets ended mostly in green after preliminary data showed Japan's economy expanded less than expected in the second quarter, as weak domestic demand offset robust exports. Source- AceEquity

## NEWS BULLETIN

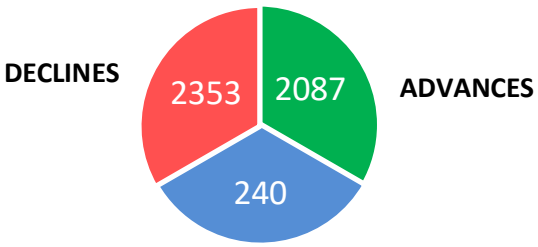
- **BEML** has received an order valued at $6.65 million from Mauritius for the supply of BE220G Hydraulic Excavators for deployment across key African markets, including Liberia, Sierra Leone, Ghana, Democratic Republic of Congo (DRC), Cote d'Ivoire and neighboring countries.
- **Admach Systems** has secured an order worth Rs 1.59 crore from a domestic steel and alloy manufacturing company. The order is for the supply of Bar handling System for Auto-UT Machine. The order is to be executed within 7 months from the PO date. The company's current order book stands at Rs 68.37 crore.
- **TCS** has launched TCS ADD AgentHub, a role-based, enterprise-ready, and trusted AI platform that enables the use of agentic AI in drug development at scale.

## MARKET DRIVING SECTOR : IT




**S&P BSE: IT**
**CLOSING: 29,595.84**
**CHANGE: - 525.60**
**CHANGE: - 1.74%**

## MARKET BREADTH – NEGATIVE




## RATIO ANALYSIS

| PUT CALL RATIO | PE MULTIPLE OF NIFTY |
|---|---|
| 0.99 | 20.49 |

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